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ENG 337 ORGANIZATION BREAKDOWN STRUCTURE for

Department of Energy I-MANAGE Program

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1.03	*5 Feb 03*	Document renumbered – previous version had wrong numbering schema.	Don A. Cox, PMP
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Approvals

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Distribution

This document has been distributed to:

Name	Function

Organization Breakdown Structure

1. Description

1.1. Programs are comprised of projects and, in some cases, ongoing operational activities. To effectively coordinate and administer these activities, an organization is broken down into separate groups, each assigned specific responsibilities, and each working towards clearly defined goals and objectives.

1.2. An organizational breakdown structure represents and describes:

1.2.1. The relationships between the individual projects and the I-MANAGE Program organizational units.

1.2.2. The reporting relationships between the individual projects and the I-MANAGE Program organizational units.

1.2.3. The reporting relationships with the delivery organization (Team IBM) and with the other performing organizations.

1.2.4. The team structure of the individual projects and I-MANAGE Program organizational units.

2. Purpose and Objectives

2.1. The purpose of the Organizational Breakdown Structure is to show how the I-MANAGE Program and its associated project initiatives are organized and to provide a basis for planning the work of each project organizational unit.

2.2. The objectives of this document are

2.2.1. To graphically represent the organizational breakdown structure and reporting relationships of the I-MANAGE Management Structure.

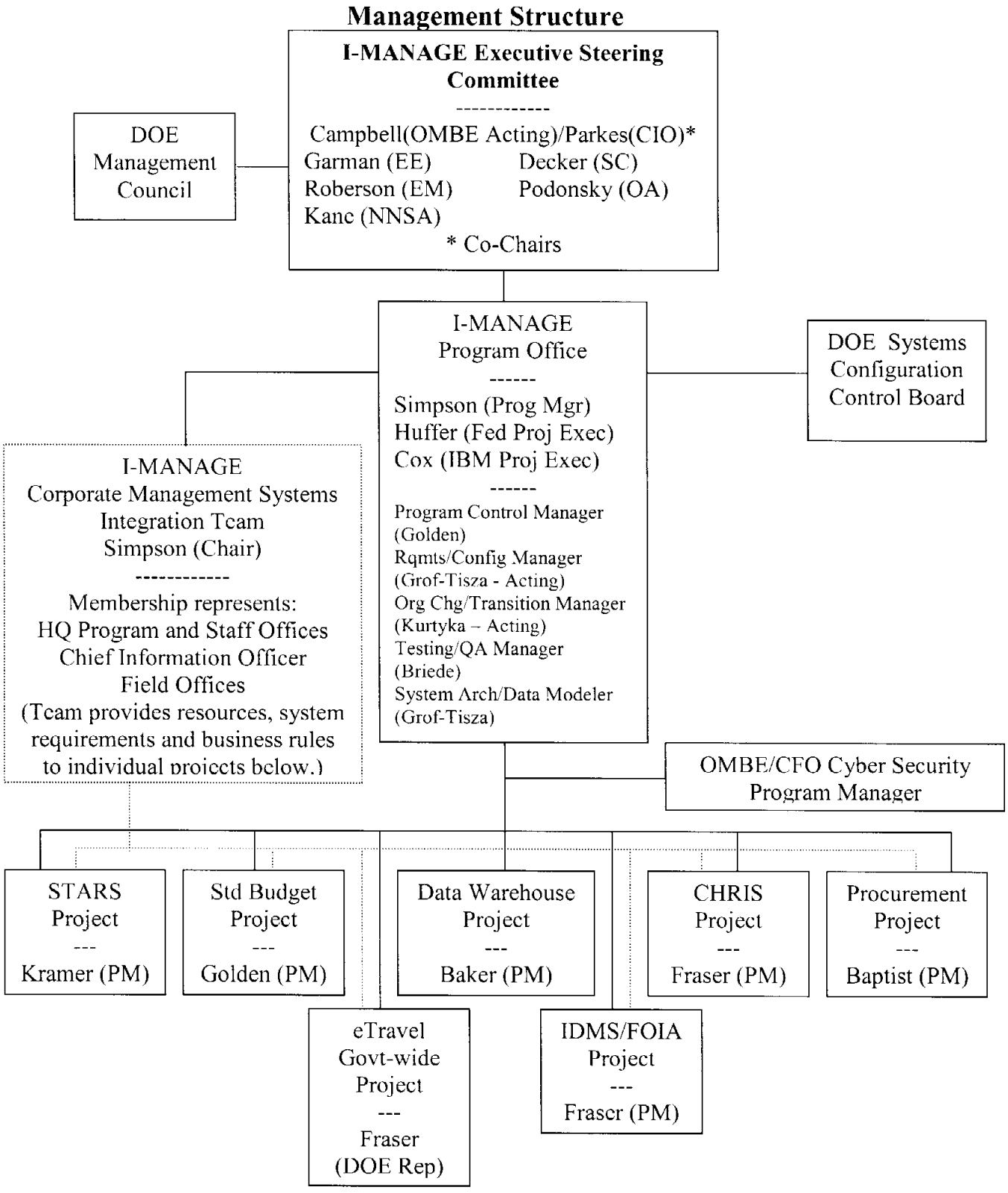
2.2.2. To describe specific roles and responsibilities of the I-MANAGE Management Structure.

2.2.3. To graphically represent, in more detail, the interrelationships between the I-MANAGE Program Management Office and individual I-MANAGE project initiatives.

2.2.4. To provide a breakdown of the specific roles and responsibilities for members of the I-MANAGE Program Office and how that relates to the individual I-MANAGE project initiatives.

2.2.5. To provide a breakdown ***by activity*** that identifies the specific roles and responsibilities of the I-MANAGE Program Office versus I-MANAGE project initiatives.

2.2.6. Integrated Management Navigation System (I-MANAGE) Program



3. Description of Organizational Units within the I-MANAGE Management Structure

3.1. I-MANAGE Executive Steering Committee

3.1.1. The I-MANAGE Executive Steering Committee reports on I-MANAGE Program activities to the Department's Executive Management Council. This group will provide executive advice to the I-MANAGE Program Manager, and facilitate resolution of major Departmental issues as needed.

3.1.2. This group demonstrates clear executive sponsorship of the I-MANAGE Program to ensure Department-wide support and prioritization

3.2. Department of Energy Management Council

3.2.1. The Department of Energy Management Council reports to the Secretary of Energy, and provides the highest level of executive sponsorship of the I-MANAGE Program.

3.2.2. Ultimately, this council demonstrates involvement by the four major business units of the Department.

3.3. I-MANAGE Program Management Office (PMO)

3.3.1. The I-MANAGE PMO will manage the integration and development of the Department's Corporate Business Management Systems.

3.3.2. To achieve this, the I-MANAGE PMO will develop standard policies, procedures, work products and deliverables to establish a consistent, repeatable approach to project management, project execution, and product delivery.

3.3.3. The I-MANAGE PMO oversees individual I-MANAGE Projects to ensure consistency and verify that established I-MANAGE standards are followed, to include:

3.3.3.1. Development and execution of program plans/schedules;

3.3.3.2. Resource planning, cost and schedule control;

3.3.3.3. Organization planning and staff acquisition;

3.3.3.4. Risk/issue management;

3.3.3.5. Scope management;

3.3.3.6. Requirements and configuration management;

3.3.3.7. Documentation management;

3.3.3.8. Communications and organizational change management;

3.3.3.9. Team development and training management;

3.3.3.10. Testing and quality assurance;

3.3.3.11. Cyber security management.

3.3.4. The I-MANAGE PMO will ensure corporate business systems:

3.3.4.1. Are responsive to Program Secretarial Offices, Administrative Staff Offices, and internal customer needs;

3.3.4.2. Meet OMB/Treasury requirements;

3.3.4.3. Support the President's Management Agenda;

3.3.4.4. Comply with the Department's Enterprise Architecture.

3.3.5. The I-MANAGE PMO will ensure commitment of adequate resources from Program Secretarial Officers and Staff Officers to support the I-MANAGE integration efforts.

3.3.6. All members of the I-MANAGE PMO and project managers for individual project initiatives within the I-MANAGE Program must work cooperatively with each other to ensure effective two-way communications with special focus on issues related to integration and unification of systems, data, and business processes.

3.3.7. The I-MANAGE Program Control Manager will:

3.3.7.1. Establish policies and procedures for the administration, execution, and control of individual project initiatives in the I-MANAGE portfolio. Identify standard templates and work products for individual project initiatives.

3.3.7.2. Areas of responsibility include project plan development and execution; project schedule development and control; project resource planning; project organizational planning and staff acquisition; project cost control; project risk and issue management.

3.3.7.3. Review project plans, schedules, and budgets for individual I-MANAGE Project Initiatives, and report issues to the I-MANAGE Program Manager.

3.3.7.4. Review project schedule and budget performance, and report issues to the I-MANAGE Program Manager.

3.3.7.5. Review project risk and issue planning, evaluation, quantification, mitigation, and monitoring, and report issues to the I-MANAGE Program Manager.

3.3.8. The I-MANAGE Requirements / Configuration Manager will:

3.3.8.1. Establish policies and procedures for identification, administration, and control of business requirements associated with individual I-MANAGE project initiatives. Coordinate the

integration and assignment of Departmental requirements across the portfolio of I-MANAGE project initiatives, and assist individual project initiatives with development of their project charter, assumptions, and constraints.

3.3.8.2. Interpret and implement Federal and Departmental guidance related to definition of business requirements and configuration management.

3.3.8.3. Act as a liaison and participate in Department wide activities for identifying and assessing high-level business requirements that result from "user needs and wants" definition sessions, and in identifying possible opportunities for integration or leverage with other Federal agencies or organizations.

3.3.8.4. Develop standards, policies, and procedures for storing and controlling project documents, work products, and deliverables (document management).

3.3.8.5. Develop standards, policies, and procedures for consistent configuration and change management as it relates to change in scope, requirements, or configuration.

3.3.8.6. Work with executives, managers, and stakeholders in the Department to identify and document project scope and high-level requirements.

3.3.8.7. Work with project teams to effectively administer and coordinate project scope, configuration, change management, and project document control. Report any issues or concerns to the I-MANAGE Program Manager.

3.3.8.8. Establish I-MANAGE Program baseline for individual project initiatives scope, and approved business requirements.

3.3.8.9. Work cooperatively with individual I-MANAGE Project Managers to ensure traceability between Departmental goals and objectives, I-MANAGE business requirements, detailed requirements, and design specifications for individual project initiatives.

3.3.8.10. Work cooperatively with the Test / Quality Manager to ensure traceability between Departmental goals and objectives, I-MANAGE business requirements, and test scripts for individual project initiatives.

3.3.8.11. Establish standards for change to system, software, or business processes for I-MANAGE systems that have migrated to a production environment.

3.3.8.12. Assess needs for requirements and configuration management training among OMBE or its successor organization staff, recommend strategies for upgrading capabilities, and evaluate training activities.

3.3.9. The I-MANAGE Organization Transition Manager will:

3.3.9.1. Develop, administer, and maintain the I-MANAGE Program Communications Management Plan.

3.3.9.2. Ensure that clear, accurate, and consistent communications are provided by each project, and coordinated by the I-MANAGE Program Office.

3.3.9.3. Develop standards, policies, and procedures for organizational change / transition management for the I-MANAGE Program, and verify that each I-MANAGE project initiative has a formal organizational change / transition management plan in place.

3.3.9.4. Work with key stakeholders and training groups within the Department to develop standards, policies, and procedures for end-user and stakeholder training, and verify that each I-MANAGE project initiative has a formal training plan in place.

3.3.9.5. Work with project teams to establish project team charters, and to build effective, high-performance integrated project teams.

3.3.9.6. Develop standards, policies, and procedures to ensure a streamlined, effective transition to operations for individual project initiatives within the I-MANAGE portfolio.

3.3.9.7. Provide oversight of project communications management, organizational transition / change management, project team development, and project training management. Report issues to the I-MANAGE Program Manager.

3.3.10. The I-MANAGE Testing / Quality Assurance Manager will:

3.3.10.1. Develop standards, policies, and procedures for formal, rigorous testing of software, systems, training, and the effectiveness of transition management.

3.3.10.2. Develop standards, policies, and procedures for both quality assurance and quality control.

3.3.10.3. Ensure that testing, quality control, and quality assurance are specific, regularly scheduled project activities identified in each detailed project plan, and project specific policies and procedures are documented in individual project management plans.

3.3.10.4. Review project test plans and monitor project test activities.

3.3.10.5. Conduct scheduled and unscheduled project quality reviews and audits.

3.3.10.6. Work with the I-MANAGE Program Manager to schedule independent verification and validation as necessary.

3.3.10.7. Work with other external groups (the IG, for instance), to review and monitor project performance.

3.3.10.8. Report issues to the I-MANAGE Program Manager.

3.3.11. The I-MANAGE System Architect / Data Modeler will:

3.3.11.1. Verify that each project initiative within the I-MANAGE portfolio is aligned with the CIO's Enterprise Architecture, and other Departmental standards, policies, and procedures. Act as the liaison to CIO Office representatives responsible for administering the Enterprise Architecture.

3.3.11.2. Verify that each project software application conforms to an open systems model, and may be fully integrated within the I-MANAGE Program vision.

3.3.11.3. Work with executives, managers, and stakeholders in the Department to identify authoritative corporate data sources.

3.3.11.4. Use business modeling to develop standard data requirements, definitions and policies across all I-MANAGE project initiatives. Act as the liaison with corporate data owners to identify data requirements and develop standard data definitions and business rules.

3.3.11.5. Work closely with the I-MANAGE Data Warehouse Project Manager/Team to coordinate and communicate data sources, requirements, and definitions.

3.4. DOE Systems Configuration Control Board (CCB)

3.4.1. The DOE Systems Configuration Control Board will establish and publicize criteria and controls for acceptable system changes, establish dollar thresholds for acceptable changes, review and approve configuration change proposals.

3.4.2. As part of this process, they will set time frames for implementation, monitor the status of approved change proposals, and identify and take action on configuration management non-compliance.

3.5. I-MANAGE Corporate Management Systems Integration Team

3.5.1. The I-MANAGE Corporate Management Systems Integration Team is an extremely important group within the I-MANAGE Management Structure. They provide organizational representation to accomplish Department-wide, corporate business management system initiatives.

3.5.2. This group defines essential requirements, technical terms and business rules for functional areas of responsibility, and assist with development of corporate requirements. They review requirements that originate from other representatives on the team, and provide their perspective through comments and recommendations to ensure Department-wide acceptance of the requirements.

3.5.3. This group differentiates between true requirements as opposed to business processes that can and should be modified to establish standard Department-wide policies, practices, and systems.

3.5.4. They identify, coordinate, and negotiate requirements involving multiple offices based on established business relationships or common needs, and weigh costs, benefits, and availability of resources to establish and prioritize requirements.

3.5.5. Individuals on this team will act as positive change agents by communicating within their respective organizations the progress and status of I-MANAGE Program initiatives.

3.6. I-MANAGE Project Team Leaders

3.6.1. The I-MANAGE Project Team Leaders manage the day-to-day project development life-cycle activities, as they relate to their project, including:

3.6.1.1. Work cooperatively with each other and the I-MANAGE Program Management Office to ensure effective two-way communications with special attention to issues of cross-project integration and coordination.

3.6.1.2. Development and execution of project plans/schedules;

3.6.1.3. Resource planning (staffing and budget), cost and schedule control;

3.6.1.4. Risk/issue management, and cyber security planning, assessment, and deployment;

3.6.1.5. Requirements and configuration management;

3.6.1.6. Documentation standards, review and approval of work products and deliverables;

3.6.1.7. Communications, training, and organizational change management;

3.6.1.8. Testing and quality assurance;

3.6.1.9. Data conversion, interfaces, reports, and any other technical design and development activities;

3.6.1.10. Implementation planning;

3.6.1.11. Backup and recovery/continuity of operations planning.

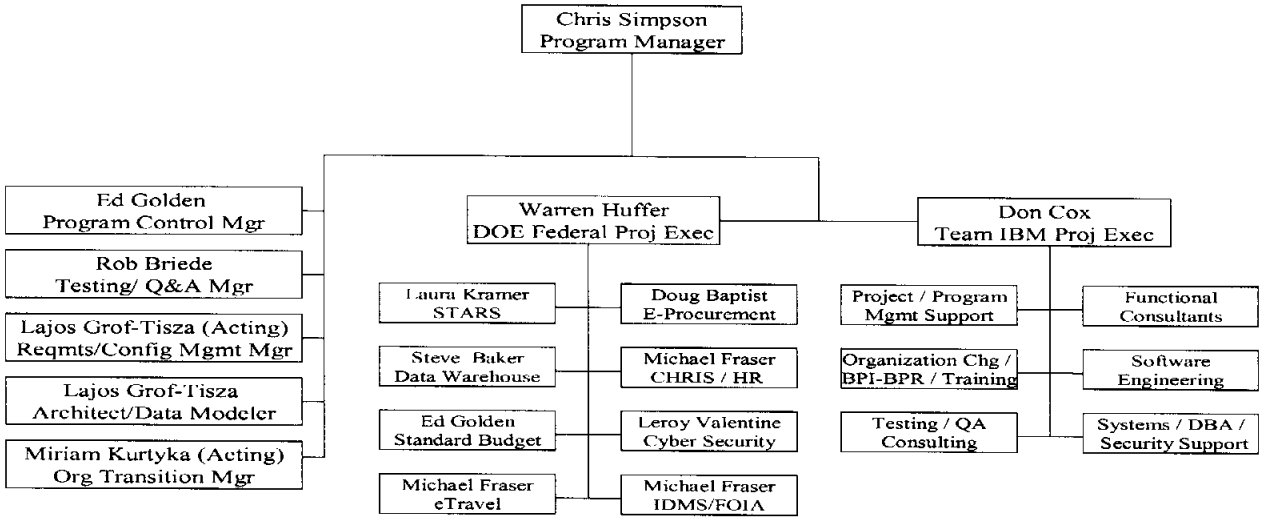
3.6.2. The Office of Management, Budget and Evaluation/CFO Cyber Security Manager will:

3.6.2.1. Work with the CIO's office, and other key stakeholders within the organization, to develop standards, policies, and procedures for coordination, administration, and integration of cyber-security within each project initiative in the I-MANAGE portfolio.

3.6.2.2. Work with individual project teams to fully integrate, design, test, and deploy cyber-security as a critical component of the system deployment.

3.6.2.3. Work with field sites and other external stakeholders to transition secured systems within their environment.

4. I-MANAGE Program Management Office, I-MANAGE Project Initiatives, and Team IBM Contractor Support



5. I-MANAGE Program Office Positions and Their Relationship to Individual I-MANAGE Project Initiatives

I-MANAGE Program Office Position	I-MANAGE Project Position(s)	Differences / Comments
I-MANAGE Program Manager: Responsible for successful completion of I-MANAGE Program. The I-MANAGE Program Manager reports to DOE Executive Management, other Departmental and Government officials, and directs day-to-day activities of I-MANAGE Program Office.	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE Project Executive (DOE – PE), working with individual DOE Project Managers, and the Team IBM Project Executive (IBM – PE), is responsible for the successful completion of individual project initiatives within the I-MANAGE Program.	The DOE – PE and Team IBM – PE report to the I-MANAGE Program Manager. Individual DOE Project Managers report to the DOE – PE. Responsibility and accountability for the I-MANAGE Program belong to the I-MANAGE Program Manager. Responsibility and accountability for individual I-MANAGE project initiatives belong to the DOE – PE. The DOE – PE will hold individual DOE – PMs responsible and accountable for their individual projects.
I-MANAGE Deputy Program Manager: The I-MANAGE Deputy Program Manager will act as the designated I-MANAGE Program	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE – PE, working with individual DOE Project Managers	TBD

I-MANAGE Program Office Position	I-MANAGE Project Position(s)	Differences / Comments
Manager in the absence of the I-MANAGE Program Manager, at the direction of the I-MANAGE Program Manager. This position is also responsible for coordination of all external communications to outside agencies and organizations regarding the I-MANAGE Program.	and the Team IBM – PE, will work with the I-MANAGE Deputy Program Manager as required.	
Program Control Manager: Establish I-MANAGE Program policies, procedures, and standard deliverables for detailed project schedules, project budgets, project resource plans, project risk / issue plans, and procurement planning and administration. Verify that each project develops these deliverables and is following the established standards. Review project status reports, earned value reports and risk / issue reports for individual projects with the DOE PE and Team IBM – PE on a monthly basis, and provide summary reports to the I-MANAGE Program Manager.	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE – PE, working with individual DOE Project Managers and the Team IBM PE, work together to establish detailed project schedules, budgets, resource plans, and project risk / issue plans. These plans are used to manage the day-to-day activities of the project teams, and manage, evaluate, and control project issues and risks. Once project schedules and budget are approved, each project manager must, within a reasonable time, have baselined project plans, be measuring earned value performance, and provide status reports of progress against schedule and budget targets.	The Program Control Manager provides *program* direction for consistent, repeatable policies, procedures, and deliverables; evaluates risks and issues reported by the individual projects and, together with the DOE – PE and the Team IBM – PE, brings those to the attention of the I-MANAGE Program Manager, if necessary. The individual project managers maintain and report project status and earned value performance to the DOE – PE. The Program Control Manager summarizes and reports project status and earned value performance at the aggregate level for the I-MANAGE Program.
Testing / Quality Assurance Manager: Establish I-MANAGE Program policies, procedures, and standard deliverables for testing of software, systems, training, and the effectiveness of transition management; quality control; and quality assurance. Verify that each project develops these deliverables and is following established standards. Work with the DOE – PE, project managers, and Team IBM – PE to review test plans and test results, and conduct scheduled and unscheduled project quality reviews and audits. Coordinate external reviews of individual I-MANAGE project initiatives. Work with project team leaders to support an active QA environment. The QA Test Manager will request necessary paperwork prior to onsite visits with sufficient lead time to support the request. Discuss results with Project Team Leaders as soon as possible after a quality audit or review.	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE – PE, individual DOE Project Managers, and the Team IBM PE, work together to establish detailed project test plans, and quality management plans. These plans are used to manage project related testing activities, quality assurance, and quality control. Work with the Testing/QA Manager to modify policy, procedures, standards and guidance to fit the project type and environment. Project Team Leaders will provide the Testing/QA Manager with requested paperwork prior to onsite visits. Each Project Manager is responsible for execution of project level test plans, and quality management plans. As testing activities take place, the project manager is accountable for completion of test scripts that can be traced back to project requirements, and the results of testing activities. As project activities are in progress and/or completed, the	The I-MANAGE Testing / Quality Assurance Manager provides *program* direction for consistent, repeatable policies, procedures, and deliverables; reviews the results of testing activities to ensure that they are planned, properly conducted, and the results are documented. The I-MANAGE Testing / Quality Assurance Manager will audit and verify that project work products associated with specific project activities are developed according to standards, and are available in draft, final, and approved formats according to the individual project schedule timelines.

I-MANAGE Program Office Position	I-MANAGE Project Position(s)	Differences / Comments
Resolve quality issues at the Project Team Leader level. Monthly, or as necessary, provide reports on the status of testing to the Project and Program Management.	project manager is responsible for completion of deliverables or work products associated with the given activity. These are subject to review and approval by the I-MANAGE Program as determined by I-MANAGE Program policies and procedures. Work with Testing/QA Manager Leader to develop an audit and review schedule that is workable and has the least impact on project activities. Ensure that regular peer reviews and internal audits are conducted, recorded and monitored.	
Requirements / Configuration Manager: Establish I-MANAGE Program policies, procedures, and standard deliverables for project scope, high-level business requirements, detailed system requirements, documentation hardcopy and electronic storage, configuration, and change management. Verify that each project develops these deliverables and is following established standards. Work with the DOE PE and the Team IBM – PE to ensure that scope, high-level business requirements, and detailed system requirements for each project are clearly documented, and configuration and change management activities beyond the scope of the individual project are properly administered and escalated. Maintain a consolidated list of I-MANAGE business requirements, the responsible project, and the current status of the requirements. Working with the DOE – PE, verify that projects have a formal configuration management plan in place, and are following the plan. Provide summary reports to the I-MANAGE Program Manager.	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE – PE, individual DOE Project Managers and the Team IBM – PE work together to develop an approved statement of scope for each project, project level integrated change management plans, and configuration management plans. This will naturally flow from the high-level business requirements provided by the I-MANAGE Requirements / Configuration Manager, and the contract with Team IBM. Each individual project manager is responsible for identifying, evaluating, prioritizing, and documenting detailed system / business requirements for their project initiative, according to the standards established by the I-MANAGE Requirement / Configuration Manager, and circumscribed by the approved statement of scope. Approved detailed requirements must be provided to the I-MANAGE Requirements / Configuration Manager. The DOE PE will ensure that each project initiative is following approved source code control / system configuration management standards through the use of approved configuration management software.	The I-MANAGE Requirements / Configuration Manager provides *program* direction for consistent, repeatable policies, procedures, and deliverables associated with scope planning and management, system configuration, software configuration, source code control, and integrated change management. This is not to be confused with organizational change / transition management. The DOE – PE, working with individual project managers and the Team IBM PE, is responsible and accountable for ensuring that each project is following policies, procedures, and standards for scope planning and requirements management, system configuration, software configuration, and source code control. Each project manager must develop detailed change management policies and procedures for changes to project scope or requirements, project schedules or budgets, project quality management, project staffing management, project risk management, project communications management, and system configuration, based on guidance provided by the I-MANAGE Requirements / Configuration Manager. Where possible, individual projects may reference existing documents rather than rewriting or copying portions into a separate deliverable.
System Architect / Data Modeler: Establish I-MANAGE Program	**DOE Project Executive, Team IBM Project Executive, Project**	The I-MANAGE System Architect / Data Modeler provides *program*

I-MANAGE Program Office Position	I-MANAGE Project Position(s)	Differences / Comments
policies, procedures, and standard deliverables for systems integration, systems architecture, data analysis, data modeling, software development, and alignment with the Enterprise Architecture. Verify that each project develops these deliverables and follows established standards. Act as liaison to the CIO's Office. Maintain a consolidated collection of systems and data architectural graphics for all I-MANAGE projects, and provide oversight of I-MANAGE systems integration. Maintain the I-MANAGE Data Dictionary. Work with the DOE – PE and the Team IBM – PE to ensure that each project is properly aligned with the Enterprise Architecture. At the request of the DOE PE, assist individual projects with data modeling and system architecture activities, and verify that the result of these activities is properly aligned with the I-MANAGE vision and the Enterprise Architecture. Provide summary reports on the status of the I-MANAGE System Architecture and data model to the I-MANAGE Program Manager.	**Managers:** The DOE – PE, individual DOE Project Managers and the Team IBM – PE work together to document the system and data architecture for individual projects, and to properly document project specific terms, fields, and business rules for inclusion in the I-MANAGE Data Dictionary. Project managers are responsible for completion of the Enterprise Architecture templates related to the product of their project, and observing standards for review and approval of these documents. The DOE – PE and the Data Warehouse Project Manager will work with the I-MANAGE System Architect / Data Modeler to ensure that the design of the I-MANAGE Data Warehouse is based upon an enterprise perspective, and addresses the broad goals and objectives of the entire organization.	direction for consistent, repeatable policies, procedures, and deliverables associated with the technical infrastructure, systems architecture, and integrated data model of I-MANAGE unified applications and systems. While each project will maintain a data dictionary specific to their project initiative, the I-MANAGE System Architect / Data Modeler must maintain the consolidated data dictionary to ensure consistency across the organization, use of common terms, elimination of redundant data elements, system and architectural integrity, and referential integrity.
Organizational Transition Manager: Establish I-MANAGE Program policies, procedures, and standard deliverables for communications management, training, organizational change, and organizational transition management. Verify that each project develops these deliverables and follows established standards. Work with the DOE – PE and the Team IBM – PE to coordinate training and organizational change / transition activities that may overlap with other project initiatives, or will require interfacing with DOE Executive Management or other senior officials. Provide summary reports to the I-MANAGE Program Manager on the status of project communications, training activities, change campaigns, and organizational transition activities.	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE – PE, individual DOE Project Managers and the Team IBM – PE work together to develop project specific communications management, training, and organizational change / transition management plans according to standards established by the I-MANAGE Organizational Transition Manager. Individual project managers are responsible and accountable for execution of these plans.	The I-MANAGE Organizational Transition Manager provides *program* direction for consistent, repeatable policies, procedures, and deliverables associated with communications management, organizational change, organizational transition, and training. The DOE – PE, working with individual project managers and the Team IBM – PE, is responsible and accountable for ensuring that each project is following these policies and procedures, and is developing the appropriate deliverables according to schedule. Where training or organizational change activities impact stakeholders outside of the direct project community, coordination and scheduling would be the responsibility of the I-MANAGE Organizational Transition Manager, working with the DOE – PE.
DOE Project Executive: The I-	**Project Managers:** The DOE – PE	This establishes a clear chain of

I-MANAGE Program Office Position	I-MANAGE Project Position(s)	Differences / Comments
MANAGE Program Manager will hold the DOE – PE responsible and accountable for the successful delivery of the product and/or services of each I-MANAGE Project.	will hold the individual project managers responsible and accountable for the successful delivery of the product and/or services of their assigned project.	command, and specific responsibilities and accountabilities.
Team IBM Project Executive: The I-MANAGE Program Manager will hold the Team IBM – PE responsible and accountable for the successful delivery of the product and/or services of each I-MANAGE Project.	**Team IBM Project Managers:** The Team IBM – PE will hold the individual Team IBM project manager assigned to each I-MANAGE project initiative responsible and accountable for the successful delivery of the product and/or services of their assigned project.	This establishes a clear chain of command, and specific responsibilities and accountabilities.
Cyber Security Manager: Establish I-MANAGE Program policies, procedures, and standard deliverables for planning, integration, design, testing, and deployment of cyber security within each project initiative in the I-MANAGE portfolio. Act as a liaison to the CIO's Office, and any other organization, group, or official within DOE who has responsibility for cyber security related activities. Review, evaluate, and provide guidance on government wide cyber security issues, regulations, and guidance. Provide scheduled and non-scheduled review of cyber security detection, protection, and reporting activities within each I-MANAGE project initiative. Provide summary reports to the DOE PE on the status of cyber security issues, progress, and activities.	**DOE Project Executive, Team IBM Project Executive, Project Managers:** The DOE – PE, individual DOE Project Managers and the Team IBM – PE work together to develop project specific cyber security plans for each individual project. The individual project manager is responsible and accountable for execution of their specific cyber security plan.	The I-MANAGE Cyber Security Manager reports to the DOE – PE, and provides *program* direction for consistent, repeatable policies, procedures, and deliverables associated with cyber security as it relates to the I-MANAGE Program. Individual project managers are responsible and accountable for ensuring that their systems and services are fully secured according to the standards established by the Department of Energy.

6. I-MANAGE Activities: I-MANAGE Program Office vs. I-MANAGE Projects

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
Project Management Policies and Procedures: Establish policies and procedures for standard project management processes to include project planning, initiation, execution, control, and closing. Members of the I-MANAGE Program Management Office will work with the DOE Project	Follow I-MANAGE standards for project planning, initiation, execution, control, and closing.	The I-MANAGE Program Office establishes consistent, repeatable processes for project management of individual I-MANAGE project initiatives. Individual projects will follow these standards.

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
Executive, the IBM Project Executive, and the individual project managers in following a consistent, repeatable process for project management.		
Integration Management: The I-MANAGE Program Management Office must ensure tight integration of all I-MANAGE projects. This involves solid application of Enterprise Architecture concepts for consistent design, proper mapping of business processes, data, and security, and elimination of redundancies and inefficiencies in the process	Follow direction of the I-MANAGE Program Office; identify and report any issues or concerns to the DOE Project Executive for review as appropriate.	It is imperative that the I-MANAGE Program Office provides the coordination of multiple projects to achieve the integration implicit in the I-MANAGE vision.
Scope Management: The I-MANAGE Requirements / Configuration Manager will work with the DOE Project Executive, Team IBM Project Executive, and individual I-MANAGE project managers to create a statement of scope for each project, establish processes for baselining scope, and document guidance, policies, and procedures for change of project scope.	Where Team IBM supports project activities, the DOE Project Executive will work with DOE Procurement to establish the formal agreement on contractor requirements in support of the defined scope. Based on approved purchasing instruments from the DOE Procurement Office, develop a written statement of scope for each project. The statement of scope provides a common understanding of the purpose of the project. System requirements naturally follow from the statement of scope.	Funding and resource requirements are directly related to the scope of each project. The I-MANAGE Program Office provides guidance and oversight in defining project scope, while the project team is responsible for formally documenting the project statement of scope. The I-MANAGE Program Office approves the project statement of scope, and through the Configuration Control Board, provides policy and guidance for change to the approved scope and requirements baselines for individual projects.
Schedule Management: The I-MANAGE Program Office has published high-level project schedules through the original POA&Ms. The I-MANAGE Program Control Manager will work with the DOE Project Executive, Team IBM Project Executive, and individual I-MANAGE project managers to develop the detailed MS Project Plan, and when approved, verify that the MS Project Plan is "baselined" for the purpose of formal earned value management.	Based on approved purchasing instruments from the DOE Procurement Office, the COTR, and their Team IBM counterpart, the DOE Project Executive and individual Federal project managers will review the original POA&Ms and develop detailed MS Project Plans that reflect the work to be done on the project. When approved, baseline the plans and initiate earned value management.	The I-MANAGE Program Office developed the original POA&Ms. The individual projects, assisted by the DOE Project Executive, and the Team IBM Project Executive, are responsible for development of the detailed MS Project Plan, which must then be approved by the I-MANAGE Program Office.
Cost Management: The I-MANAGE Program Office has published high-level project schedules through the original POA&Ms, and Team IBM has provided resource cost estimates based on these schedules. The DOE Procurement Office establishes the contractual boundaries for administration of the purchase order, and the Contracting Officer's Technical Representative (COTR) is	Based on approved purchasing instruments from the DOE Procurement Office, the COTR, and their Team IBM counterpart, the DOE Project Executive and individual Federal project managers will baseline project costs, and monitor and report variances using earned value management.	Project funding is based on a number of related factors, with the most important being the level of funding appropriated by Congress. Delays or shortfalls in funding can have a "ripple" effect on the ability of project teams to achieve assigned target dates and meet project goals and objectives. Accurate, timely earned value analysis is essential to quantify the impact of project delays.

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
accountable for monitoring and administering cost controls. The I-MANAGE Program Control Manager will work with the DOE Project Executive, Team IBM Project Executive, COTR, and individual I-MANAGE project managers to ensure that costs are "baselined" for the purpose of formal earned value management.		
Quality Management: The I-MANAGE Testing / QA Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for quality management, and will work with the DOE Project Executive and individual project managers to ensure that rigorous and formal quality assurance and quality control activities are incorporated as specific activities in each project plan.	The DOE Project Executive and individual project managers are accountable for deliverables and work products associated with quality management. The individual project managers must document quality plans for their projects. Wherever possible, working with the I-MANAGE Testing / QA Manager, they should "incorporate by reference" any applicable documents to reduce unnecessary duplication. The IBM Project Executive will work with individual IBM project managers to apply knowledge and expertise in this area.	Quality should be planned into every aspect of each project by conducting Peer Reviews, cross-checks, internal reviews, and verified through scheduled and unscheduled audits and reviews. The cost of quality must be balanced with the finite capital and human resources to ensure the most efficient and effective cost benefit ratio for the Department.
Human Resources Management: The I-MANAGE Program Control Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for management of human resources within each project initiative. In general, this involves organizational planning (identifying, document, and assigning project roles, responsibilities, and reporting relationships), and staff acquisition (getting the human resources needed assigned and working). The process of team development will be a responsibility of the Organizational Change / Transition Manager.	Individual project managers will develop Project Staff Management plans specific to their project, with clearly defined roles and responsibilities, reporting and escalation procedures. The IBM Project Executive, working within IBM procurement policies and guidelines, is responsible and accountable for human resources management of contractor resources.	Departmental HR policies and procedures will provide the foundation and boundaries for management of human resources. Any I-MANAGE Program or individual project policies and procedures may not contradict DOE or Federal personnel management policies or procedures.
Communications Management: Communications that will be issued outside of the I-MANAGE Program must be reviewed and approved by the I-MANAGE Program Manager or delegate. This would include any briefings, newsletters, or status reports. The I-MANAGE Program Manager	Careful coordination of project communications is essential. Project teams, project managers, and the DOE Project Executive must be acutely aware of how information is disseminated through both formal and informal channels, and the harm that may be caused by unnecessary and/or	Discretion and professionalism are key to effective communications at all levels.

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
has delegated this responsibility to the Deputy Program Manager.	premature release of information, without encumbering the project team with restrictions that constrain the valid flow of project level information.	
Risk Management: The I-MANAGE Program Control Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for identification, analyzing, and responding to project risks, and work with the DOE Project Executive to ensure that individual projects have incorporated specific risk management activities within their project plans, and are conducting risk management activities according to plan.	The DOE Project Executive will work with individual project managers to ensure that each project conducts an initial risk assessment to identify and evaluate project risks, define appropriate risk responses, monitor, and control project risks. Risk mitigation strategies, where appropriate, will be developed. Regularly scheduled project risk review sessions will be scheduled for each project.	The I-MANAGE Program Control Manager should work closely with the DOE Project Executive to ensure effective risk management policies are understood and administered.
Procurement Management: The DOE Procurement Office will play an important role in this process, and the I-MANAGE Program Control Manager will establish program guidance, policies, and procedures for procurement management. The I-MANAGE Program Control Manager must carefully monitor procurement issues, evaluate, and respond to requests for assistance from individual COTR's, and the DOE Project Executive, and report procurement and funding issues to the I-MANAGE Program Manager.	The DOE Project Executive will work with the individual project managers and COTR(s) on procurement management policies and procedures. The IBM Project Executive will work with the appropriate individuals within IBM to effectively and efficiently address procurement issues.	Procurement management is ultimately the responsibility of the Contracting Officer from DOE Procurement, and the COTR. However, their activities directly impact, and are impacted by other variables.
Configuration Management: The Requirements / Configuration Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for configuration management across I-MANAGE project initiatives, oversee the activities of the Configuration Control Board. An immediate requirement is to establish the boundaries of what processes, systems, and infrastructure fall under this responsibility (configuration items), and determine the current baseline.	The DOE Project Executive will work with the individual project managers to ensure that integrated configuration change policies and procedures are carefully followed.	When considering the technical configuration, and use of specific software tools for system / hardware / software configuration management (e.g. Merant's PVCS tools are currently used for STARS source code control), the Requirements / Configuration Manager must work closely with the System Architect / Data Modeler.
Requirements Definition: The Requirements / Configuration Manager, working with the DOE Project Executive, and the IBM Project	The DOE Project Executive will work with the individual project managers to ensure that the process to identify detailed requirements and establish the	Requirements definition can occur at different times. Business requirements must exist for creation of the Exhibit 300 for projects. Well defined

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
Executive, will establish guidelines, policies, and procedures for requirements definition, prioritization, and tracking. Typically, requirements definition is an iterative process comprised of a series of distinct steps: initial fact finding / requirements gathering; analysis and classification; prioritization; integration and validation. This process will dovetail with the configuration management policies and procedures once a project requirements baseline has been established.	requirements baseline is well understood, that requirements are properly documented, and communicated to the Requirements / Configuration Manager.	requirements should be included in the Statement of Work (SOW) for individual projects to establish a clear understanding of the scope of work. In some cases, the will provide time for analysis and development of requirements.
System / Enterprise Architecture: The System Architect / Data Modeler, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for I-MANAGE Program system / enterprise architecture issues, and ensure alignment of I-MANAGE project initiatives with the CIO's Enterprise Architecture.	The DOE Project Executive will work with the I-MANAGE project managers to ensure that the guidelines, policies, and procedures established by the System Architect / Data Modeler are properly applied, and alignment with the CIO's Enterprise Architecture is demonstrated.	The System Architect / Data Modeler shall act as liaison between the CIO's office and the individual project teams. This will require and detailed knowledge of the requirements of the Enterprise Architecture, and a comprehensive understanding of how individual project initiatives and systems fit into the Enterprise Architecture.
Systems Support: The I-MANAGE Program Office will delegate responsibility for systems support to the individual project initiatives when projects are in progress. The I-MANAGE Program Control Manager and the System Architect / Data Modeler will work with the DOE Project Executive to establish guidelines, policies, and procedures for transition of systems to a production environment.	The I-MANAGE Project Executive will work with I-MANAGE project managers to establish consistent policies and procedures for support of software, systems, and infrastructure related to their specific project. As part of the Deployment Phase of each project, detailed transition plans, systems support plans, help desk support plans, and training plans for support personnel must be developed. Detailed system "Concept of Operations" manuals must be developed for each project.	Assuming a common hardware, software, and infrastructure, system support for I-MANAGE projects may be consolidated to reduce overall support costs, both during the project phase, and after the transition to a production environment.
Data Modeling: The System Architect / Data Modeler, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for I-MANAGE Program data modeling activities. This requires comprehensive understanding of formal data modeling tools and techniques, including the use of entity relationship diagramming, data normalization, and best practices for relational database modeling.	The DOE Project Executive will coordinate requirements for data modeling with the I-MANAGE project managers and their technical development team members, and ensure that data modeling activities adhere to guidelines, policies, and procedures established by the System Architect / Data Modeler.	The System Architect / Data Modeler will provide the common oversight for data modeling that achieves an integrated vision. By reviewing proposed data models from individual teams within the context of the overall I-MANAGE vision, the Department can achieve a much tighter design, eliminate data redundancies, and ensure both data and referential integrity.

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
Data Warehouse Modeling: See Data Modeling above.	The I-MANAGE Data Warehouse Project Team will acquire technical resources trained in the formal aspects of Data Warehouse modeling. The DOE Project Executive and the I-MANAGE Data Warehouse project manager will ensure that data warehouse modeling activities adhere to guidelines, policies, and procedures established by the System Architect / Data Modeler.	The IBM Project Executive will ensure that trained technical resources are provided.
Database Administration: The I-MANAGE Program Office will delegate responsibility for database administration to the individual project initiatives when projects are in progress. The I-MANAGE Program Control Manager and the System Architect / Data Modeler will work with the DOE Project Executive to establish guidelines, policies, and procedures for transition of database management responsibilities to a production environment.	The I-MANAGE Project Executive will work with I-MANAGE project managers to establish consistent policies and procedures for database administration requirements related to their specific project. As part of the Deployment Phase of each project's, detailed transition plans, database administration support plans, and training plans for support personnel must be developed. Detailed system "Concept of Operations" manuals must be developed for each project.	Assuming a common hardware, software, and infrastructure, system support for I-MANAGE projects may be consolidated to reduce overall support costs, both during the project phase, and after the transition to a production environment.
Data Warehouse Design: The System Architect / Data Modeler will be available to support the I-MANAGE Data Warehouse Team in their design activities.	The I-MANAGE Data Warehouse project manager will ensure that formal data warehouse design standards are identified and followed throughout the Design and Configure Phases of the project.	The IBM Project Executive will ensure that trained technical resources are available.
Data Warehouse Development: The System Architect / Data Modeler will be available to support the I-MANAGE Data Warehouse Team in their development activities.	The I-MANAGE Data Warehouse project manager will ensure that formal data warehouse development standards are identified and followed throughout the Design and Configure Phases of the project.	The IBM Project Executive will ensure that trained technical resources are available.
Software Design / Development: The System Architect / Data Modeler will be available to support the I-MANAGE project teams in any necessary software design or development activities. The Requirements / Configuration Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish documented guidance, policies, and procedures for software configuration management.	The DOE Project Executive will ensure that each project team follows documented software design and development standards. Each individual I-MANAGE project manager is responsible for their project team's software design and development activities, and for adherence of their team to published software configuration management guidance, policies, and procedures.	If the development process for each project is completed on the Oracle architecture, the teams may leverage work already completed by the STARS Team. Software may be developed for conversion programs, interface programs, COTS package extensions, triggers, or alerts.
Software Testing: The Testing / QA Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines,	The DOE Project Executive will ensure that each project team follows documented software testing guidelines, policies, and procedures.	The STARS project has completed a significant amount of work in the areas of test planning, test scripting, and recording of test results. The I-

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
policies, and procedures for testing of any software developed in conjunction with I-MANAGE project initiatives.	Each individual I-MANAGE project manager is responsible for their project team's testing activities.	MANAGE PMO should leverage this work where possible.
Infrastructure Testing: The Testing / QA Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for testing of infrastructure associated with I-MANAGE project initiatives. This should be coordinated with the CIO's office, especially where performance and stress testing falls outside the boundaries of I-MANAGE systems (e.g. DOENet, Tivoli Storage Manager, etc.)	The DOE Project Executive will ensure that each project team follows documented infrastructure testing guidelines, policies, and procedures. Each individual I-MANAGE project manager is responsible for their project team's testing activities.	The IBM Project Executive will ensure that technical expertise is available in support of this process.
Training: The Organizational Change / Transition Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for creating training strategies, developing training master plans, developing course content, and conducting training activities. The Organizational Change / Transition Manager will work with the Testing / QA Manager to formalize a mechanism to measure the effectiveness of training activities through quality management.	The DOE Project Executive will ensure that each I-MANAGE project team adheres to the established guidelines, policies, and procedures relating to training activities within their assigned project. Each individual I-MANAGE project manager is accountable for training activities within their project.	The IBM Project Executive will ensure that professional training expertise is available to the project teams. A significant amount of work has been completed on the STARS project, and should be leveraged where possible.
Organizational Change Management: The Organizational Change / Transition Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for effectively implementing organizational change associated with the deployment of I-MANAGE business systems, and will assist I-MANAGE project teams in affecting positive organizational change in support of the I-MANAGE Program.	The DOE Project Executive will ensure that each I-MANAGE project team adheres to the established guidelines, policies, and procedures for implementing organizational change. Each individual I-MANAGE project manager will ensure that organizational change assessments are conducted for their projects, that organizational change / transition plans are created and executed, and that targeted change campaigns to address specific issues are conducted.	Clearly, given the broad impact of these system initiatives on the organization, a critical success factor will be effective organizational change / transition management.
System Deployment: The I-MANAGE PMO will have a wide range of responsibilities for deployment of I-MANAGE Systems. The Program Control Manager will ensure that detailed project plans have been developed. The Testing / QA Manager will ensure that preliminary	The DOE Project Executive will ensure that each project team deploying a system to a production environment is ready and able to affect a smooth transition. Each individual I-MANAGE project manager is responsible and accountable for the smooth transition of their system to	Clearly, system deployment is a total team effort, and is the crucial gauge of success in each I-MANAGE initiative. Both the Department and IBM will be measured by their ability to smoothly transition systems to the production environment.

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
testing has been conducted, and that the results are satisfactory. The Organizational Change / Transition Manager will ensure that training activities have been properly conducted, including system users and support personnel. The Requirements / Configuration Manager will ensure that the system has been migrated to a production environment.	production.	
Validation and Verification: The Testing / QA Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for independent validation and verification as necessary.	The DOE Project Executive will ensure that each project team has implemented validation and verification of project work products and deliverables throughout their project lifecycle. The individuals conducted validation and verification activities will be determined at the discretion of the individual project teams.	The combination of ongoing and independent validation and verification of project work products is critical to achieving the level of quality necessary for the success of the I-MANAGE Program.
Documentation Standards: The I-MANAGE Program Office will establish standards for I-MANAGE documents, including formats for headings, presentations, external deliverables, and work products.	The DOE Project Executive will ensure that each I-MANAGE project manager is familiar with the published standards. Each I-MANAGE project manager is responsible for application of the standards to their project.	A draft standard has been proposed.
Documentation Storage / Electronic: The Requirements / Configuration Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for electronic storage of documents within the I-MANAGE Program Office, and for each of the individual I-MANAGE project initiatives.	The DOE Project Executive will ensure that each I-MANAGE PROJECT manager is familiar with and observes the published standards. Each I-MANAGE project manager is responsible for application of the standards to their project.	The electronic directory structure for the STARS project has been used quite successfully, and in the absence of a formal document management capability, this approach may best facilitate a consistent, repeatable process.
Documentation Storage / Hard Copy: The Requirements / Configuration Manager, working with the DOE Project Executive, and the IBM Project Executive, will establish guidelines, policies, and procedures for storage of hard copy documents within the I-MANAGE Program Office, and for each of the individual I-MANAGE project initiatives.	The DOE Project Executive will ensure that each I-MANAGE PROJECT manager is familiar with and observes the published standards. Each I-MANAGE project manager is responsible for application of the standards to their project.	The STARS project has a separate hard copy library with indexed binders, an approach that may make sense for other projects.
Approval of Work Products: Work product approval will be divided between the projects and the I-MANAGE PMO. The critical distinction must be based upon what work products properly fit within the	The project teams will have significant input into this process. Within the POA&M's, there are specific milestones associated with key deliverables.	This process will continue to evolve.

I-MANAGE Program Office Activities	I-MANAGE Project Activities	Differences / Comments
project sphere, and which work products have a broader impact, and thus, must be considered from the I-MANAGE PMO perspective.		

7. Terms and Definitions[1]

Term	Definition
Accounting Flex-Fields or AFF	Within the Oracle Financial Applications, the set of configurable fields that uniquely identify the account code combination for individual debit / credit transactions, used to generate account balances within the General Ledger table.
Architecture	In technology, the term architecture can refer to either hardware or software, or to a combination of hardware and software. The architecture of a system always defines its broad outlines, and may define precise mechanisms as well. An open architecture allows the system to be connected easily to devices and programs made by other manufacturers. Open architectures use off-the-shelf components and conform to approved standards. A system with a closed architecture, on the other hand, is one whose design is proprietary, making it difficult to connect the system to other systems.
Assumptions	In project management terms, assumptions are factors which are considered for planning purposes to be real, true, or certain
Charter	A charter is a document that formally authorizes a program or project. It documents the business need being addressed, and describes at a high level the purpose of the program or project.
Configure	Populating database tables with DOE specific alphanumeric sequences or activating/deactivating a software switch (i.e. radio button or checkbox) to make certain aspects of the software function.
Constraint	In project management terms, a constraint is a factor that limits the project team's options.
Cost Accounting	A technique or method for determining the cost of a process, and a managerial accounting activity designed to help managers identify, measure, and control operating costs. The cost is determined by direct measurement, systematic assignment and rational allocation
COTS	Commercial Off the Shelf (software). Software designed for a broad range of commercial customers, and maintained by the vendor. Functionality will be based upon industry recognized best practices. The software will be flexible and configurable so that variances in more specific requirements are handled via settings within the application(s) rather than customization of software application programs.
Customize	Changing the COTS software code.
Dashboard	A formatted screen presentation that provides senior management with specific information designed to enhance their management capability, such as performance measures from the previous day. The data is typically presented in graphical format, with drill-down capability to see supporting detail data.
Data Dictionary	A set of database tables and views that contains administrative information about users, data storage, and privileges. It is created and maintained automatically.
Database	A collection of data, stored in tables, and objects, such as stored procedures and triggers. The term can also refer to the software used to create, store, and manage this data—for example, the Oracle*8i* server.
Database Administrator or DBA	The person who prepares the Oracle*8i/9i* server and Oracle tools for an installation or upgrade of Oracle Applications, and performs maintenance on them after the installation. The DBA has access to the ORACLE SYSTEM and SYS accounts.
Database Instance	A running ORACLE system. There is always a one-to-one correspondence between an ORACLE instance and a system global area (SGA).

[1] Terms and definitions were derived from a number of sources including PMI's "A Guide to the Project Management Body of Knowledge™", the Department of Energy's Statement of Work for I-MANAGE, the Department's Enterprise Architecture, the "Oracle U.S. Federal Financial User Guide", and the "Oracle Application Concepts Glossary of Terms".

Term	Definition
Database Object	A logical entity created and stored in a database. Tables, views, synonyms, indexes, sequences, stored procedures, materialized views, and triggers are all examples of database objects.
Database Server	A machine on which the database holding Oracle Applications data resides. The Database server processes SQL and Java requests from other machines, such as Forms servers, HTTP servers, and concurrent processing servers.
Data Mart	A subset of a data warehouse (see Data Warehouse), a data mart provides data for a specific organizational function or group.
Data Warehouse	A way of storing aggregated, highly indexed data from multiple transactional systems (OLTP) in a format that supports decision support systems (DSS), and online analytical processing (OLAP). The data is "read only" (cannot be modified by users), and "historical" (even if only a few minutes old).
Decommission	To remove and dispose of hardware platform no longer in use.
Desktop Client	A computer that sends user requests to the forms server and handles responses such as screen updates, pop-up lists, graphical widgets, and cursor movements.
Digital Signature	A means of guaranteeing the authenticity of a program or collection of data, such as a JAR file. It is typically an encrypted message that contains the identity of the code's author.
Dimension	As related to the design of a data warehouse, "dimensions" provide grouping parameters for "facts" (see Facts below). For example, we may view daily labor costs for environmental cleanup by aggregating multiple cost transactions into a single daily record. In this case, the "labor costs" are considered to be facts, with the time dimension (daily), and category dimension (environmental cleanup) used to provide better oversight for decision support and analysis.
DISCAS	Departmental Integrated Standardized Core Accounting System. The current transaction level accounting used at the Department of Energy. This system resides on HP/3000 computers, and was developed in HP/COBOL on an HP Turbo-Image file structure.
DOE	Department of Energy
DOE-Net	The Department of Energy wide area network.
Enterprise Architecture	In the Department of Energy, the Enterprise Architecture establishes an analytic framework by defining linkages among the business, data, applications, and technology components of the architecture. When key components such as the systems and technology initiatives are *linked*, then *matched to prioritized Departmental goals and objectives*, the business reason for IT investments becomes clear.
Entity Relationship Design	ERD. A diagramming tool that depicts the relationships (one to one, one to many, many to many) of data stores or record layouts to one another. For example, a vendor record may have many related address records: one for billing, one for return shipments, one for customer complaints. This would be reflected as a one (vendor record) to many (address record) relationship on an ERD.
ERP	Enterprise Resource Planning (software); a closely integrated suite of software applications, usually built on a common database architecture.
EV or Earned Value	Earned Value – The earned value, or 'budgeted cost of work performed' (**BCWP**) compares the amount and cost of work planned with what was actually accomplished.
EVMS	Earned value management system. Part I, Section H of OMB Circular A-11, Section 300, requires that submitted projects adhere to a Performance Based Management System or EVMS that meets ANSI/EIA Standard 748.
Extension	Within a COTS application, individual programs will have predefined "exit" points where clients may insert their own code routines. This code is protected in future upgrades, and is not considered a customization by the vendor.
Facts	As related to design of a data warehouse, "facts" are defined as numeric measures or metrics, typically aggregated from detailed transaction data that is captured in an online transaction processing system (OLTP). For example, if we want daily labor costs and hours, we will sum multiple entries for a single day from the OLTP source system into daily "fact" records, further classified based on one or more "dimensions" (see Dimensions above).

Term	Definition
FMFIA	Federal Managers Financial Integrity Act
Form	A logical collection of fields, regions, and graphical components that appears on a single screen. Oracle Applications forms resemble paper forms used to run a business. End-users enter data by typing information into the form.
Gap	See "Process Gap"
Gap Analysis	To analyze a known system or environment compared to a new system or environment and identify where there are gaps between the two. Gaps should be defined in terms that are quantifiable and verifiable.
Go-live	Migrating a system or software from a test or development environment to a production environment.
GOTS	Government off-the-shelf software application. Software developed specifically for a government entity, based on common requirements for a majority of similar operations. The software will be flexible and configurable so that variances in more specific requirements are handled via settings within the application(s) rather than customization of software application programs.
GPRA	Government Performance and Results Act
Instance	A single copy of the Oracle Applications database. For the STARS Project, we will have multiple instances: one for production, one for "patch" testing, one for training, and one for ongoing development testing.
Integrated Contractor	DOE facilities and activities are contracted out to various organizations in a relationship referred to as government owned, contractor operated (see GOCO above). A subset of these contractors interface their accounting systems with the Department. These are called "integrated contractors".
Integration vs. Interface	The key distinction is whether or not the data has to be converted to a new format or moved to be used by other modules in the system. The Government uses the term integrated to means the data does not have to move or be converted to be used. For example, all the modules of the CFS should be integrated. In contrast, the feeder systems to the STARS System will be interfaced using a standard format and data elements.
Integration Testing	The phase in a structured testing approach that involves testing all programs within the entire system in unison to identify any defects that result from the interaction between programs within different application modules.
Integrator	The individual or organization responsible for installing a software application and/or hardware platform in an existing technical environment by developing and installing necessary physical and virtual links to existing applications, platforms, or systems.
OMB	Office of Management and Budget
ORACLE	Oracle Corporation developed the first commercial relational database, and provides commercial ERP software and consulting.
Organizational Change Management	The process of managing change within a target organization.
Organizational Change Strategy	Development of a business strategy to most effectively implement and manage change in a target organization.
Patch	A software "fix". If a software program has a defect or "bug", the vendor will issue a revised version of the program, referred to as a "patch".
PCR	Project change request. A PCR is necessary to record a request for change to project scope, schedule, budget, or resource baselines, based on standard change management processes, policies, and procedures. The PCR is reviewed by the appropriate individual or change control board, who may approve, deny, or defer the change request.
PM	Project Manager
PMBOK	Project Management Body of Knowledge – Is a sum of knowledge within the profession of project management.
PMI	Project Management Institute – The governing body of the PMBOK.

Term	Definition
Process Enabled Business Transformation	A structured approach for implementing commercial off-the-shelf software (COTS) based on mapping business processes to the functionality within the software, identifying process gaps, developing gap-closures strategies, modifying business processes to align with the software, and training end-users in the use of the software according to the realigned business processes.
Process Gap	When implementing a commercial, off-the-shelf package, integrators will map business processes to the software's functionality and identify areas where the software will not easily match with the current business process. These are referred to as "process gaps".
Product Lifecycle	Expected life of a product in the market place
Program	A group of projects managed in a coordinated way to achieve efficiencies not realized when managed separately.
Program Management Charter	A charter is the document that authorizes a group to utilize resources of the organization and describes the purpose and objective.
Program Management Office (PMO)	A management team tasked with coordinating program management activities for multiple projects including identification and integration of individual project objectives within the context of all projects assigned to the program; communications, procurement, risk, and quality assurance management.
Project	According to the Project Management Institute (PMI – see above), a project is a temporary endeavor undertaken to create a unique product or service. A project must have a definite beginning and definite end, and will result in a product or service that may be distinguished from any other product or service in some way.
Project Integration Management	Processes to ensure that the various elements of the project are properly coordinated, including project plan development, execution, and integrated change control.
Project Scope Management	Processes required to ensure that the project includes all work required, and only the work required, to complete the project successfully. This includes project initiation, scope planning, scope definition, scope verification, and scope change control.
Project Time Management	Processes required to ensure timely completion of the project, including activity definition, sequencing, duration estimating, schedule development, and schedule control.
Project Cost Management	Processes required to ensure that the project is completed within the approved budget, including resource planning, cost estimating, cost budgeting, and cost control.
Project Quality management	Processes required to ensure that the project will satisfy the needs for which it was undertaken. It consists of quality planning, quality assurance, and quality control.
Project Human Resources Management	Processes required to make the most effective use of people involved with the project, including organizational planning, staff acquisition, and team development.
Project Communications Management	Processes required to ensure timely and appropriate generation, collection, dissemination, storage, and disposition of project information, including communications planning, information distribution, performance reporting, and administrative closure.
Project Risk Management	Processes concerned with identifying, analyzing, and responding to project risk, to include risk management planning, risk identification, qualitative / quantitative risk analysis, risk response planning, risk monitoring, and risk control.
Project Procurement Management	Processes required to acquire goods and services from outside the performing organization. It consists of procurement planning, solicitation planning, solicitation, source selection, contract administration, and contract closeout.
Project Configuration Management	Processes required to manage physical items and processes by managing information about them, including changes, and assuring conformance in each case. This includes information that could impact safety, quality, schedule, cost, profit, or the environment. Project configuration management should accommodate change; optimize reuse; ensure that requirements are clear, concise, and valid; communicate clearly and precisely; and verify that results conform in each case.
Punch-list	A checklist of activities typically used to ensure that all steps in a given process are completed in the proper sequence.

Term	Definition
Recast	Recast is the process of replacing the value in a cell of a table with another value. For transactional data, it normally requires preparing automated reversing transactions for transactions containing the old value and creating new ones with the new value. For reference tables, it usually means closing an old value and opening the replacement value. Recasts can replace values one for one, one for many, or many for one. Many for one recasts require percentage or fixed dollar allocations between the new values.
Requirement	According to the Institute of Electrical and Electronics Engineers (IEEE), a requirement is "(1) a condition or capability needed by a user to solve a problem or achieve an objective; (2) a condition or capability that must be met or possessed by a system or system component to satisfy a contract, standard, specification, or other formally imposed documents; (3) a documented representation of a condition or capability as in (1) or (2).
Server	Software that provides resources, such as files and processing, to desktop clients. Server processes may communicate with other servers to gather the data or complete the processing, but ultimately the information is returned to a desktop client.
SOW	Statement of Work – A narrative description of products or services to be supplied under contract.
System Administrator	The person who manages administrative tasks in Oracle Applications, such as registering new users and defining system printers, using the system administrator responsibility.
System Test	The phase in a structured testing approach that involves testing all programs within a single module in unison to identify any defects that result from the interaction between programs within that module.
Walk-through	A technique used to verify the quality of code developed and tested by a developer. Usually, a technical lead will meet with the developer who will provide print-out copies of the code, which is then reviewed by both parties to ensure quality and consistency.